


Benefits - Post-tax PremiumsTransaction Code:
PA30

Purpose	Use this procedure to set an employee's health insurance premium deduction to post-tax.
Trigger	Perform this procedure when setting an employee's health insurance premiums to be deducted on a post-tax basis.
Prerequisites	The employee is active in HRMS.
End User Roles	In order to perform this transaction you must be assigned the following role: Benefits Processor, Payroll Processor










Change History	Change Description
1/26/2009	Procedure created.

Menu Path Human Resources → Personnel Management → Administration → HR Master Data
→ Maintain

Transaction Code PA30

Helpful Hints	 <p>Employees can elect this option as a new enrollee or during the open enrollment period.</p> <p>If the employee is manually enrolled into their health care plan, the system automatically defaults as post-tax so the box can be left unchecked.</p> <p>If payroll has been processed after the infotype is created and the record is maintained without changing the start date, the system will trigger a retroactive payroll back to the beginning date of the record and collect the unpaid taxes for those retro periods.</p>
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to validate and proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

1. Start the transaction using the above menu path or transaction code **PA30**.

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 629438

Name SMITH CURTIS P

PersArea 2250 Washington State Patrol EEGroup B Civil Service Exempt

PSubarea 00VA Commission Off EESubgroup 18 M-OT Elig>Shift Status Active

Find by

Person

Collective s

Search Terr

Free search

Mailing Add

Basic Personal Data Payroll Benefits Time Recording Addtl. Person...

Infotype text E...

Actions

Organizational Assignment

Personal Data

Addresses

Planned Working Time

Basic Pay

Contract Elements

Date Specifications

Family/Related Person

Period

Period

From To

Today Curr.week

All Current month

From curr.date Last week

To Current Date Last month

Current Period Current Year


Choose



Direct selection

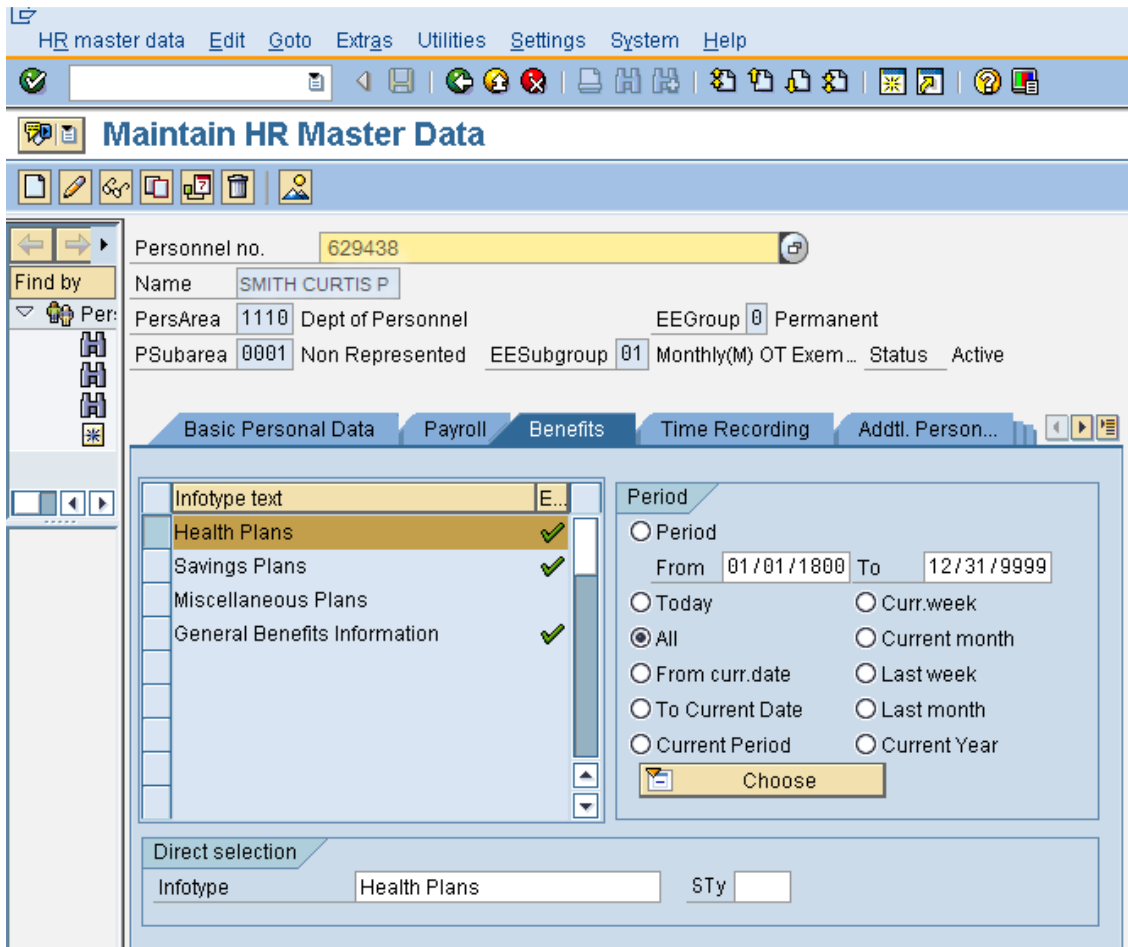
Infotype STy


2. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no	R	The employee's unique identifying number. Example: 629438

3. Click  (Enter) to validate the information. Verify you have accessed the correct employee record.


4. Click the **Benefits** tab to select.
5. Select the blue box to the left of  Health Plans  to select.
6. Select ☐ All in the Period section.



7. Click  (Overview) to display a list of all actions associated with Health Plans (0167).

8. Select the blue box to the left of current Medical plan to select. The current record will have an end date of 12/31/9999.

Start Date	End Date	Type	Text	Plan	Text
12/31/2007	12/31/9999	DENT	Dental	WLD	Willamette Dental
01/16/2006	12/30/2007	DENT	Dental	REG	Regence BlueShield Columbia De
01/01/2006	01/15/2006	DENT	Dental	REG	Regence BlueShield Columbia De
12/31/2006	12/31/9999	MEDI	Medical	GH...	Group Health Coop Value
01/16/2006	12/30/2006	MEDI	Medical	GHC	Group Health Coop Classic
01/01/2006	01/15/2006	MEDI	Medical	GHC	Group Health Coop Classic

9. Click  (Change) to change the record.

Infotype Edit Goto Extras System Help

Change Health Plans (0167)

Personnel No. 319438 Name SMITH CURTIS P

PersArea 1110 Dept of Personnel EGroup 0 Permanent

PSubarea 0001 Non Represented ESubgroup 01 Monthly(M) OT Exem... Status Active

Start 12/31/2006 to 12/31/9999 Chng 12/29/2006 TIDALSAP

Plan GHCV Group Health Coop Value

Plan data Administration Costs Dependents Additional data

General plan data

Benefit area US USA

Plan type MEDI Medical

Benefit plan GHCV Group Health Coop Value

Health Plan Option GHCV Group Health Cooperative Value

Dependent Coverage MED3 Employee + Children

Planning Parameters

Cost Rule Variant GHV2 Employee + Children

10. Click the **Costs** tab to select.

11. Click ☒ Deductions Pre-Tax to uncheck the option.



The checked box indicates pre-tax premiums.

Plan data Administration Costs Dependents Additional data

Calculated costs

Period 2 Semi-monthly Calculation Date 01/26/2009

Employee costs	22.00	USD	<input type="checkbox"/> Deductions Pre-Tax
Additional Post-Tax	0.00	USD	
Employer credit	280.50	USD	<input type="checkbox"/> Credits Allowed
Provider Cost	302.50	USD	Imp.income 0.00 USD

Individual employee costs

Period 2 Semi-monthly

Alternative Cost Amt USD Bonus Cost USD

12. Click (Enter) to validate entries.

13. Click (Save) to save.



The system displays the message, "Record changed."

14. You have completed this transaction.

Results

You have successfully set the health premiums to deduct on a post-tax basis for an employee.

Comments

None.